Regional Program Standards

Focus:	❑ **WorkSource Centers** ❑ **Other:**	☒ **Youth Program Services**

Topic: Learn & Earn

Date: July 1, 2024	❑**New** ☒ **Revised**	

Overview

Learn & Earn offers project-based Learning Opportunities to connect young people with peers and mentors. Learn & Earn Contractors provide Stipends, through the Worksystems infrastructure, for positive youth development and early career and job skill exposure activities as a form of violence prevention. Services are designed to build resilience in young people ages 14 to 24 experiencing barriers to employment and in need of interpersonal and community connections.

Contents

Quality Jobs Initiative

The Department of Labor and Worksystems are prioritizing advancing quality jobs in the workforce system through guidance, performance measurement, strategic use of funding opportunities, and provision of technical assistance based on data-driven and evidence-based workforce strategies.

A Quality Job helps workers achieve economic stability and mobility while prioritizing diverse representation, equitable work environments and worker voice. The Columbia-Willamette Workforce Collaborative convened a Quality Jobs Council – comprised of 19 cross-sectoral Participants representing businesses, workers, labor, service providers and government agencies – to develop a regional definition of Quality Job to include: 1) self-sufficiency wages; 2) safe working conditions/worker engagement; 3) predictable hours; 4) comprehensive benefits; 5) accessible hiring and onboarding practices; and 6) training and advancement opportunities.

Worksystems will continually engage with employers and build partnerships that increase opportunities for populations that have been historically excluded and underrepresented in careers with elements of high job quality.

Using labor-market data and this definition of a Quality Job, Worksystems has identified targeted sectors with low barrier entry that offer high-growth and high job-quality characteristics with structured career pathways. These sectors include: (1) advanced manufacturing; (2) healthcare and social assistance; (3) construction; (4) clean energy; and (5) early childhood education. Career coaching services are designed to support Worksystems' targeted sectors and assist Participants in attaining or accessing pathways to employment with self-sufficiency wages and comprehensive benefits by providing awareness and education of our targeted sectors. Guidance and training regarding Career Coaching with an emphasis on job quality will be provided by Worksystems.

Eligibility and Enrollment Requirements

Contractors must establish processes that prepare potential Participants to complete the eligibility and enrollment requirements for Learn & Earn as outlined below.

Eligibility

All Learn & Earn Participants must be between the ages of 14 and 24 when they begin receiving Learn & Earn services.

Enrollment

The following steps must be completed to enroll a Participant in the Learn & Earn program:

- The Participant applies for the program via the online program application. Completion of this step creates a Learn & Earn record in I-Trac with an Application date.

- The Participant must sign the Learn & Earn *Participation and Information Sharing Agreement* form. This signed document is Customer Attestation of date of birth. This document must be signed and dated within 90 days of the Application date and before the first Work Based Training Service start date.
- After a signed Learn & Earn *Participation and Information Sharing Agreement* form has been received Contractor must complete the Learn & Earn Registration Tab in the Participant's I-Trac Record.

Note: Applicants under the age of 18, Contractor staff must conduct due diligence to obtain parent/guardian signature for enrollment. Where a parent/guardian is absent, an Applicant under the age of 18 may be enrolled without parent/guardian signature. Once confirmed that a parent/guardian is absent, Contractor staff sign the *Participation and Information Sharing Agreement* in place of a parent/guardian with title of Career Coach printed after their signature.

Enrolled Participant

Once all elements of eligibility determination and documentation have been completed, the Applicant must begin participation in program services within 45 days of registration to be enrolled. Participation begins with the first Learn & Earn program service entered into I-Trac.

Required Disclosures

Provide and discuss the social security number (SSN) disclosure and the grievance and equal opportunity rights disclosure to ensure the Applicant understands their rights. The Applicant will acknowledge receipt of these disclosures when they sign the *Participation and Information Sharing Agreement*. No copies of the forms need be maintained in the customer file.

Social Security Number (SSN) Disclosure

A Participant's SSN is required for their inclusion in some performance cohorts. The collection of an Applicant's social security number is not required for program eligibility purposes and providers may not deny services if an Applicant is eligible for NextGen services and chooses not to disclose their number. Applicants must be provided the disclosure (Standard SSN 2018-03-01) that describes how their SSN will be used and the program's commitment to confidentiality. Where the Applicant agrees to the use of their SSN for reporting purposes, the indication is noted through I-Trac on the NextGen Application for services and the consent is the Applicants' signature on the Application.

EEO/Grievance Disclosure

The Equal Opportunity Statement and Grievance Procedure (January 2024) is to be given to the Applicant during the eligibility determination interview meeting. Reasonable efforts should be made to assure that the information and complaint procedures are understood by potential Applicants.

Ineligible Customers

Applicants who do not meet the NextGen eligibility requirements for enrollment are to be referred to other programs in the local area that may be available to provide similar services. WorkSource Center services should be reviewed and discussed, and the Applicant referred to MyWorkSource for additional service options. Formal referrals are not required. All costs associated with Participants found to be ineligible after receiving program-funded services will be disallowed.

Program Design and Service Delivery

Service Design

There are three service provision functions within the Learn & Earn program:

- Program Operators are contracted service providers with Worksystems and are responsible for overseeing the Community Referral Partners and facilitating access to the larger Worksystems youth system. Program Operators lead the onboarding and training of Community Referral Partners, conduct Participant Learn & Earn eligibility and program enrollment, I-Trac data entry and secure and manage the Learning Opportunity Site Agreement with the Community Referral Partner.

  Program Operators are responsible for collecting from the Community Referral Partners all required program documents for enrollment and service delivery including the Learning Opportunity Participation and Information Sharing Agreement, Learning Opportunity Training Agreement and stipend payment documentation.

- Community Referral Partners are community-based organizations that offer direct Participant services. All Community Referral Partners are paired with a Program Operator and enter into a Learning Opportunity Site Agreement with the Program Operator. Community Referral Partners are responsible for Participant recruitment and implementing learning opportunity services. Community Referral Partners are responsible for collecting and submitting to the Program Operator all required program documents for enrollment and service delivery including the Learning Opportunity Participation and Information Sharing Agreement and Learning Opportunity Training Agreement.

  Community Referral Partners track all Participant Learn & Earn services and submit documentation of attendance to the Program Operator for payment through the reporting system established by Worksystems. All Community Referral Partners must be based in Multnomah or Washington counties as funding allows.

- The payor of record is an organization contracted by Worksystems that is responsible for the payment and reporting of stipends.

Service Definitions

Career Coaching

Typically delivered as an individualized service, Career Coaching is relationship-based guidance and coaching dedicated to increasing the self-sufficiency of Participants through unsubsidized employment. It includes assessment of employment-related skills, identification of achievable career and training goals, and development of an achievable career plan. Career Coaches support Participants in execution of the plan and attainment of their goals by building a relationship of support and accountability. Best practices show that Participants who maintain periodic communication with a Career Coach are most likely to benefit from services.

The primary purpose of Career Coaching is working with Participants to set achievable personal, education, Training and/or employment goals and then to guide, coach, support and coordinate services and participation as they progress along a skill development pathway leading to achievement of those goals and economic and personal independence, self-sufficiency and employment in jobs with career potential.

Career Coaching staff functions include but are not limited to:

- Assist in identifying career and education goals.

- With the Participant, develop a plan that incorporates a customized set of WorkSource services (if applicable) and outside resources that will assist them in meeting their goals.
- Coach Participants in the personal and interpersonal ("soft" or "life") skills required to obtain and retain employment.
- Assist Participants in identifying and securing the resources and support necessary to succeed in their training and career plans.
- Facilitate collaboration between the different Service Providers working with the Participant to synchronize career and education goals and align resources.
- Coach Participants in job search including resume review, interview coaching, and career advising.
- Provide regular check-ins to track Participant progress and ensure Participants retain employment, including assistance in career advancement planning, resource planning, and re-placement in employment.
- Provide and/or offer connections to employment, childcare and/or housing services which are culturally specific and/or culturally responsive, based on Participants' needs.
- Management of the tracking, documentation and reporting requirements of program participation and performance.

Career Exploration
Industry-specific career exposure to training and employment opportunities in all four of the Portland Metro local area target industry sectors – manufacturing, healthcare, construction, and information technology/software. Exposure is designed to help Participants develop knowledge of the variety of careers and occupations including skill requirements, working conditions and job opportunities across a wide range of industry sectors. Useful tools are Careers NW, a Worksystems-sponsored website and Oregon Employment Department's qualityinfo.org.

Career Labs
Targeted courses of instruction in workplace skills needed for the Participant to be work ready. Providers are encouraged to utilize Worksystems-approved Career Lab curriculum. Other tools are permissible if they fulfill the required learning objectives. Refer to the *Knowledge Base* for required learning objectives. Providers may enhance instruction in Career Labs with additional activities and may adapt parts of this curriculum to meet specialized needs of their Participants. Recommended Career Lab topics include:

- Adaptability
- Analysis/Solution Mindset
- Collaboration
- Communication
- Digital Fluency
- Empathy
- Entrepreneurial Mindset
- Resilience
- Self-Awareness
- Understanding Workplace Diversity

Career Mapping

This workshop is the first step of the career planning process. Participants identify their strengths, gifts, capacities and qualities that will enable them to be successful in the work environment and potential jobs. After the workshop, the Career Coach meets individually with Participants to create a Career Plan that articulates these goals, identifies resources and outlines next steps. Refer to the Career Mapping Manual for additional information and detail.

Financial Literacy Education

Activities that teach Participants how to create budgets, initiate accounts at financial institutions, and make informed financial decisions. Financial literacy education assists Participants in learning how to effectively manage spending, credit, and debt – including student loans, consumer credit and credit cards. Activities also include educating Participants on identity theft and ways to protect themselves.

Lesson topics must include Banking Basics, Income and Employment, Budgeting, Consumer Skills, Credit and Debt, Financing Higher Education, and Insurance.

Service Providers may consider using the Prosperity Planner (https://www2.prosperityplanner.org/) as an additional tool in support of financial literacy activities.

Individual Career Plan

The Individual Career Plan identifies career pathways for the Participant that include education and employment goals, appropriate achievement objectives and appropriate services, considering the results of the Objective Assessment. The initial plan must be completed prior to the Participant's Participation date. The plan documents short- and long-term education and employment goals and identifies which WIOA Youth Elements are to be provided.

Prior to plan development, a variety of assessments must be conducted to provide critical information about the Participant's career goals, interests, aptitudes, basic academic skill level, occupational skills, work history, work and college readiness, attributes, personal strengths, developmental needs, and Support Service needs. The analysis and application of this assessment information is critical to guiding and coaching the Participant and assisting them to develop a realistic plan to reach their career goals.

The plan is a dynamic document that will change as the Participant is provided opportunities to explore optional careers of interest, through meetings in which the Participant receives advice and guidance and through a variety of work and community-based experiences exploring a range of occupational areas. The plan must be developed as a professional collaboration between the Participant and Career Coach.

Work Readiness Training

Instruction designed to increase a Participant's workplace skills that includes positive work behavior and employability soft skills training.

Work Based Training

Learning Opportunity

Learning opportunities are a structured and short-term educational engagement with documented learning objectives. Participants can earn stipends for participation in and completion of Learning Opportunities. At scheduled intervals the Career Coach assesses participant progress.

A Learning Opportunity cannot include activities typically done by an employee to the benefit of a business. An employer-employee relationship does not exist with Learning Opportunities. Participants are not working at a worksite and the Learning Opportunity is not considered a Work Experience service. Participants are not paid wages but are paid a stipend for participation in and completion of education or learning activities. Recommended Learning Opportunities include LinkedIn Learning courses, Metrix Learning courses and early career and job skill exposure activities. Other Learning Opportunities may be permissible at the discretion of the Community Referral Partner following the *Learning Opportunity Guidance* located on the Worksystems *Knowledge Base*.

A *Learning Opportunity Training Agreement* is used to establish the expectations and responsibilities of all parties when a Participant is placed in a Learning Opportunity. The Participant and the Career Coach collaboratively determine the goals and expected professional development of the Participant and complete the learning agreement. The agreement must include the type of Learning Opportunity, weekly check in schedule, learning objectives and the maximum amount of stipend that can be earned. The agreement must be signed by the Participant, Career Coach, and the Program Supervisor **prior to** the start date of the Learning Opportunity service.

Completion of the Learning Opportunity is documented through verified attendance in a training or documentation of completion of the service such as a certificate or Credential. If neither are possible, the Participant can complete a reflection exercise (video or written report) after completion of the activity. All changes to a *Learning Opportunity Training Agreement* must be documented with a case note in I-Trac.

Learning Opportunity Administrative Requirements

- *Learning Opportunity Agreements* are not to exceed $1,000. Exceptions can be made over $1,000 with approval of Worksystems.
- Participants must complete a W-9 unless they request and qualify for an exception by Worksystems.

Note: Participants who have not been granted an exception and receive more than $599 in stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.

Refer to the Stipend payments section of these Regional Program Standards and the *Knowledge Base* at https://help.worksystems.org/ for additional guidance.

Stipend

A Stipend is a sum of money paid to Participants to help cover basic costs while they engage in a Learning Opportunity services. Stipends may be paid as an hourly amount attached to program engagement or as a total sum based on the length of the learning opportunity. Every Stipend awarded must have a clear connection to a Learn & Earn Learning Opportunity service. There must be clear goals and expectations set forth as to what the Participant must do to earn a Stipend, as documented in their *Learning Opportunity Training Agreement*. The business process for Learning Opportunity Stipends is posted on the Knowledge Base and outlines the requirements to receive the Stipend and comply with these Regional Program Standards.

Administrative Requirements

Service Providers must establish a written process for paying Stipends to ensure proper and consistent application of policy and that fiscal procedures are followed. At minimum, these procedures must address the following requirements:

- Service providers must follow business processes and procedures established by Worksystems for stipend-allowable activities and related stipend amounts.
- Any Participant receiving a Stipend must complete a W-9 form. Participants receiving more than $599 in Stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.
- Each Stipend payment must include a record of the Participant's engagement such as confirmation from the Training provider of attendance, a certificate of Training completion or credential. If none of these confirmation types are possible for a Participant in a virtual Training, the Participant may provide a screen shot that shows their attendance in the relevant remote classroom. Staff must include a case note in the I-Trac record which outlines why the required documentation is not possible and justifies using the screen shot option. If none of these are possible for a Participant in a Learning Opportunity, the Participant can complete a reflection exercise (video or written report) after completion of the Learning Opportunity.
- Stipend payments are to be paid by check payable to the Participant, direct deposit into an account in the Participant's name, or via pay card through a payment system where a specific pay card is assigned to a Participant. Gift cards, gift certificates or retail vouchers cannot be used as Stipend payment.
- Participants are required to sign an acknowledgment of receipt of the Stipend. Check endorsement or direct deposit (see additional details in Support Services) may be used as the signed receipt. Where pay cards are used, the signature is to be captured at the point the pay card is given to the Participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign. Further Stipend payments to the pay card do not require additional signature.
- Stipend payments must be paid from funds during the program year in which the program engagement occurred.

Performance Data Points

Data Point	Definition
Enrollment Capacity – Participants	Minimum number of Participants supported in Learn & Earn programming (goal is equal to 80% of slots allocated to Community Referral Partners)
Enrollment Capacity – Community Referral Partners	Minimum number of Community Referral Partners engaged in Learn & Earn programming.

Additional Performance and Data Guidance

Performance data is tracked and reported through I-Trac. Where required of a performance measure element, Participant files are to contain the supporting documentation.

Contractors should establish a process to regularly review I-Trac reports for data quality. Ensure that Participants' engagement in services and credential and/or employment attainment is being entered within the required timeframes and with appropriate confirmations (where required).

Additional guidance to consider when managing data for performance follows.

Case Notes

All data entered in the I-Trac system is defined as a case note. Narrative case notes entered into the system should not repeat information already entered into the Participant's I-Trac record, but expand upon, provide context to or augment service or employment data, such as noting successes and challenges and progress toward Career Plan goals. Narrative case notes should not include any medical or treatment information, or personal information that is not relevant to their career plan activities. A case note is also to be completed to document when a Participant cannot be located or contacted.

Enrolled Participant

A customer who has completed the Learn & Earn Eligibility and Registration process and has received one Learn & Earn funded service. For the service to count and trigger participation it must be data-entered into I-Trac.

Exit

When a Participant has gone more than 90 days without a Learn & Earn program service they will be automatically exited. The Exit date is the last date of the Learn & Earn service entered in I-Trac. An Exit can be manually entered when a Participant completes all Learn & Earn services.

Global Exclusion Exit Reasons

Participants who find themselves in certain types of circumstances beyond their control and that preclude them from continuing participation in Learn & Earn program services may be manually exited from the program. When a Global Exclusion type of exit is recorded the Participant will not be included in any of the performance measure denominators.

Reserve Forces-Called to Active Duty: The call to active duty must be for more than 90 days, and a case note is to be entered which documents the information provided by the Participant.

Deceased: A case note that documents how staff received notification is required.

Health/Medical: Used when the Participant is going for any form of medical treatment that is expected to last more than 90 days. A case note that states how information was received is required. Absolutely no medical details should be included in the Participant file or I-Trac case note – just the notification information.

Institutionalized: When a Participant becomes incarcerated in a correctional institution or is a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during services. A case note that states how the information was received by staff is required. No medical details or institution name should be included in the Participant file or I-Trac case note – just the notification information.

Learning Opportunity Service Statuses

A service status is entered in the learning opportunity service in I-Trac under the following conditions:

Planned: A Participant has been matched with a learning opportunity and the service has not yet started.

Started: A Participant has started the learning opportunity.

Transferred: This status is utilized when a Participant has started a learning opportunity, but during the service the Participant is transferred to another learning opportunity.

Completed: This status is utilized for learning opportunities when the Participant has completed 80 percent of the planned activities in their *Learning Opportunity Training Agreement*. A Learning Opportunity may also be defined as completed without reaching the 80 percent completion rate if the Participant:

- Transitions to unsubsidized employment.
- Transitions to a secondary, post-secondary or occupational skills training program.
- Has an identified medical necessity that precludes them from participating in the learning opportunity.

Not Completed: This status is utilized for learning opportunities when the Participant has not completed 80 percent of their *Learning Opportunity Training Agreement*.

Quality Job Standards

A quality job helps workers achieve economic stability and mobility, while prioritizing diversity and worker voice. The Quality Job Standards below should be incorporated into to career planning discussions with Participants:

Self-Sufficiency Wages: A quality job provides sufficient income to afford a decent standard of living. For example, jobs that offer pay consistent with published self-sufficiency standards that consider family composition and cost of living.

Safe Working Conditions/Worker Engagement: A quality job offers employees dignity and respect and welcomes engagement in workplace operations. For example, quality jobs uphold and enforce anti- harassment and anti-discrimination policies and provide reasonable accommodation to employees with disabilities.

Predictable Hours: A quality job offers employees predictability on the number of hours they are offered per week to minimize hardship on employees and their families.

Comprehensive Benefits: A quality job provides basic benefits that increase economic security, improve health and overall well-being. Quality jobs include healthcare, childcare, transportation, wellness programs and access to retirement savings programs, among other supports.

Accessible Hiring and Onboarding Practices: A quality job offers transparent and accessible hiring and onboarding practices to ensure that employer and employee are set for success.

Training and Advancement Opportunities: A quality job provides opportunities to build skills and access new roles and responsibilities in a workplace. For example, quality jobs offer internal pathways to support career progression and professional development opportunities.

The Quality Jobs Framework and Quality Job Standards should be utilized keeping in mind each program Participant's unique career goals, education goals, and circumstances while developing an individualized career plan. The Framework should be used by career coaches to inform and facilitate discussions when exploring career path options and evaluating employment opportunities.

Situations may arise in which an employment opportunity does not meet all or only meets some of the quality job standards. Worksystems recognizes that getting on a pathway to a quality job is, at times, a necessary first step toward the attainment of a quality job. Supporting program Participants while they remain on their career journey toward a quality job is the primary goal of a Career Coach when it comes to advancing quality jobs, and coaching job seekers in how to recognize a quality job is the key to accomplishing that goal. In the Follow-up phase, career coaches may support Participants in refining the middle and longer-term goals in their career plans.

File Documentation

Requirement	Detail	Location
Learning Opportunity Site Agreement	Signed by the Community Referral Partner and Program Operator contractor representative. These agreements are non-financial and outline the requirements and program responsibilities of the parties involved in the learning opportunity (Community Referral Partner, Program Operator Contractor and Payor of Record). A single Learning Opportunity Site Agreement may be signed by municipalities and community-based organizations with multiple learning site locations. Agreements must be signed prior to the start date of any Learn & Earn services with the Community Referral Partner.	Program Operator Participant File
Learning Opportunity Participation and Information Sharing Agreement	All Participants must review and sign the Participation and Information Sharing Agreement which must be signed and dated within 90 days of the Application date and before the first Work Based Training Service start date. For Participants under the age of 18 the form must also be signed by a parent or legal guardian.	I-Trac Customer Documents
W-9 Form	Participants receiving a stipend of $600 or more must complete a W-9 form. Participants engaged in a project where the total stipend is less than $600 are not required to complete a W-9. The form W9 is submitted through the payor of record. No copies should be retained in the Participant file.	Payor of Record
Learning Opportunity Training Agreement	Participant training agreement that outlines the expectations and responsibilities of all parties when a Participant is placed in a learning opportunity. The agreement is developed by Community Referral Partner staff and the Participant and must be signed prior to the start date of the learning opportunity service by the Participant and Community Referral Partner coach and program supervisor. The Program Operator is responsible for collecting this document from the Community Referral Partner.	I-Trac Customer Documents
Stipend Payment Documentation	Each stipend payment for a learning opportunity must include a record of the Participant's engagement. The Community Referral Partner submits documentation of attendance to the Program Operator.	Program Operator Participant File

Requirement	Detail	Location
Pay Card Receipt Signature	Where pay cards are used, Participants are required to sign an acknowledgement of receipt of the pay card. The signature is to be captured at the point the pay card is given to the Participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign. Further payments to the pay card do not require additional signature as it is treated as a direct deposit.	Program Operator Participant File